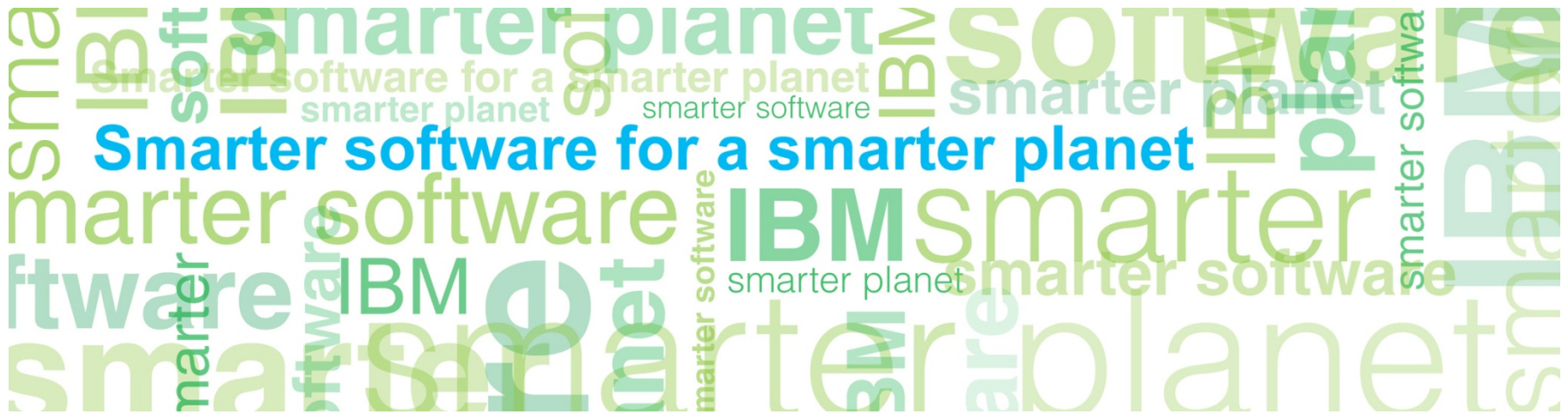# IBM Datacap Taskmaster Capture

Capture For The Enterprise

Presenters: Reggie Twigg, David Jenness, Tom Simalchik

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Agenda

- The Strategic Nature Of Capture

- The Power of Enterprise Capture

- Datacap Taskmaster Capture

- Industries and Applications

- Determining the ROI

- Software Demonstration

- Q & A

Strategic Nature of Capture

- Capture applications are the gateway to enterprise content strategies

- Driven by several key value components:

  - FTE reduction / repurposing

  - Data entry error reduction

  - Document transportation costs

  - Document retention costs

- Growing document production (paper and electronic) and government regulation mean that Capture/ECM projects remain viable and justifiable even in uncertain economic times

Why do Customers Invest in Document Capture?

- **High Volume Document Capture and Imaging**
  - Driving Process Optimization
  - Organizations with large quantities of paper-based transactions need to digitize the transactions to support applications such as: Accounts Payable Invoices, Loan Origination and Servicing, Account Opening, Insurance Claims, Government Tax, Socials Benefits, & Licenses.

- **Advanced Case Management**
  - Make effective decisions and optimize case outcomes
  - In-process-capture integrates unstructured content in mission critical business processes and enabling analytics to uncover key business insights for better decision making

- **Information Lifecycle Governance**
  - Trusted content reduces legal risk and governance costs
  - Datacap Captures and extracts meaning from unstructured information at the source to protect the chain of custody of critical business documents.

- **Green Initiatives**
  - Paperless technology reduces costs and improves efficiencies by reducing physical storage, transportation, and paper consumption.

- **Platform Standardization**
  - Across the enterprise, customers seek a consistent set of document capture technologies integrated with their ECM stack across all lines of business.
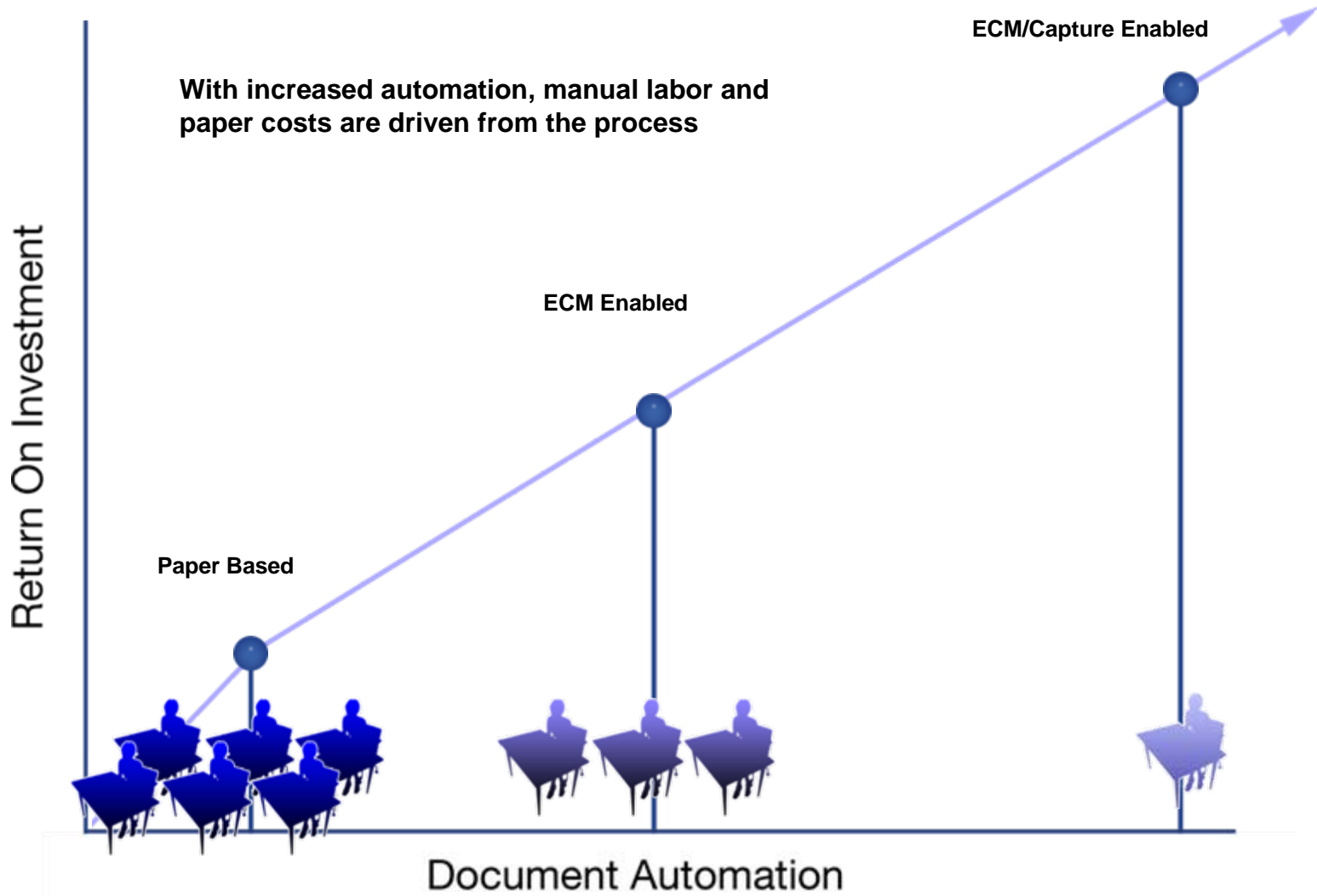
- **Rapid Return on Investment**
  - Automating capture processes takes on ECM's highest ongoing cost - labor associated with processing and transporting paper documents - easily-identifiable justification for the customer's investment.

The benefits of document imaging & capture

- Better customer/vendor service and communications

- Reduced time and resources required to manage paper and related business processes

- Improved cash flow, reduced transaction and paper costs while growing the business

- Improved collaboration as documents can be immediately accessed and shared around the world

- Elimination of lost files

- Secure and reliable backup and disaster recovery

- And overall Return On Investment

With increased automation, manual labor and paper costs are driven from the process

ECM/Capture Enabled

ECM Enabled

Paper Based

Return On Investment

Document Automation

What Do You Mean By Capture?

Basic Capture?

Departmental Capture?

Enterprise Capture?

Capture Capabilities Scale

Value / ROI

Enterprise Capture Systems

Multi-Core / Multi-CPU Support
SOA / Web Service Architecture
Line of Business & Vertical Applications
Document Classification
Distributed & Web-based Scanning
Componentized Business Rules
Complex OCR – Line Item Detail
OMR/ICR

Departmental Capture Systems

Full Page OCR
Barcode Recognition
Key From Image
Scan/Clean Up

Basic Capture Systems

Capabilities and Sophistication

Components of Enterprise Capture

Mailroom

Department

Branch

Field

Document Types:
Records
Applications
Forms
Correspondence
Policies
Inventories
R&D documents
Tax documents
Regulatory
Surveys
Subscriptions
Invoices
Claims
Sales Orders
Purchase orders
Medical Records/EOBs
Sales and Service Applications
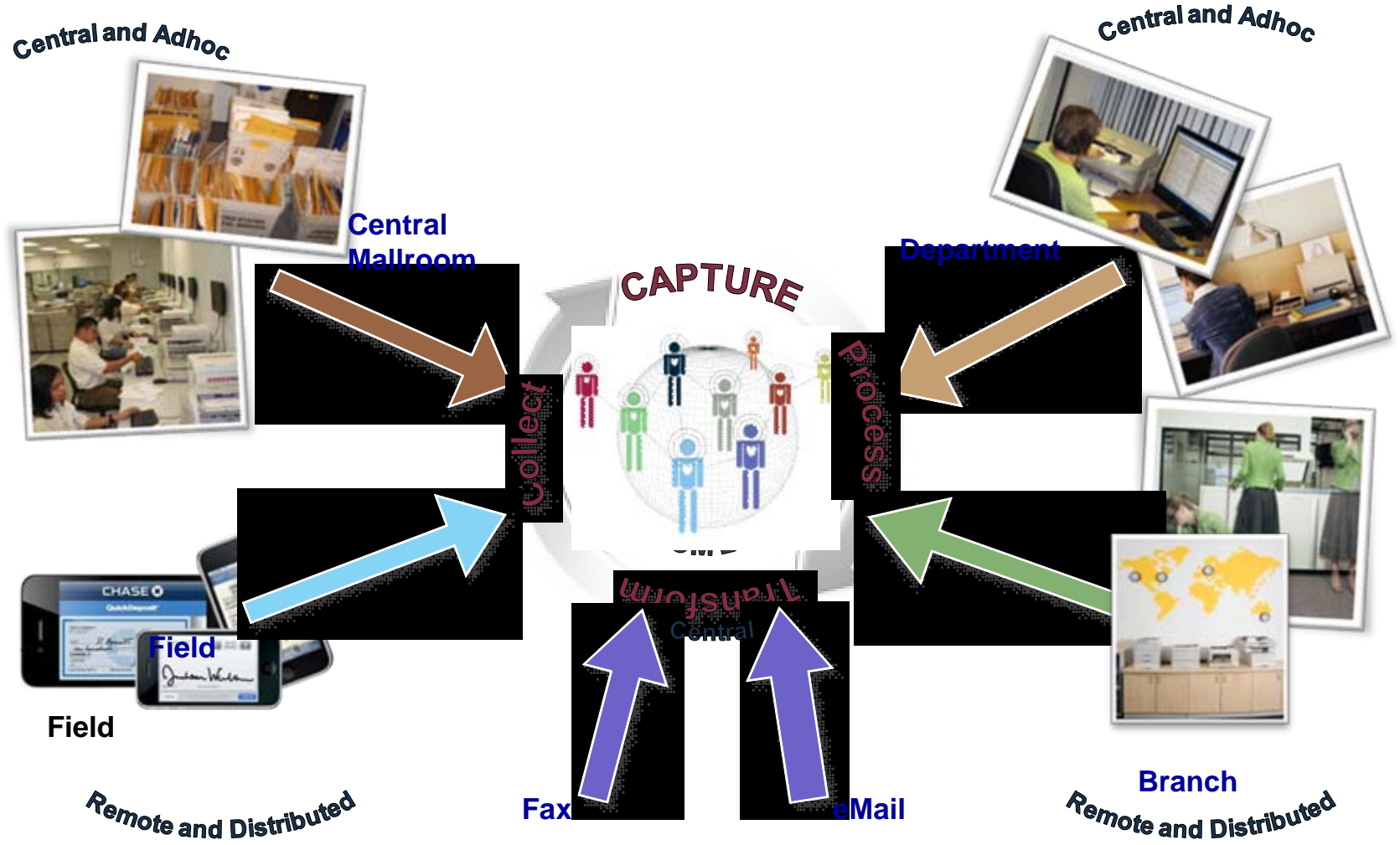Human Resources
Inventories
Loan documents
Proofs of delivery

Capture Capabilities Required:
•High volume Scanning
•Automated Indexing
•Document ID and Classification
•Handprint capture (ICR)
•Machine print capture (OCR)
•Checkbox (OMR)
•Barcode
• Email input
• Fax input
• ERP integration
• Adjudication integration
• Thin client implementation
• Robust reporting

Components of Enterprise Capture

Central and Adhoc

Central Mailroom

CAPTURE

Collect

Process

Transform

Department

Central and Adhoc

Field

Field

Remote and Distributed

Fax

eMail

Central

Branch

Remote and Distributed

Taskmaster

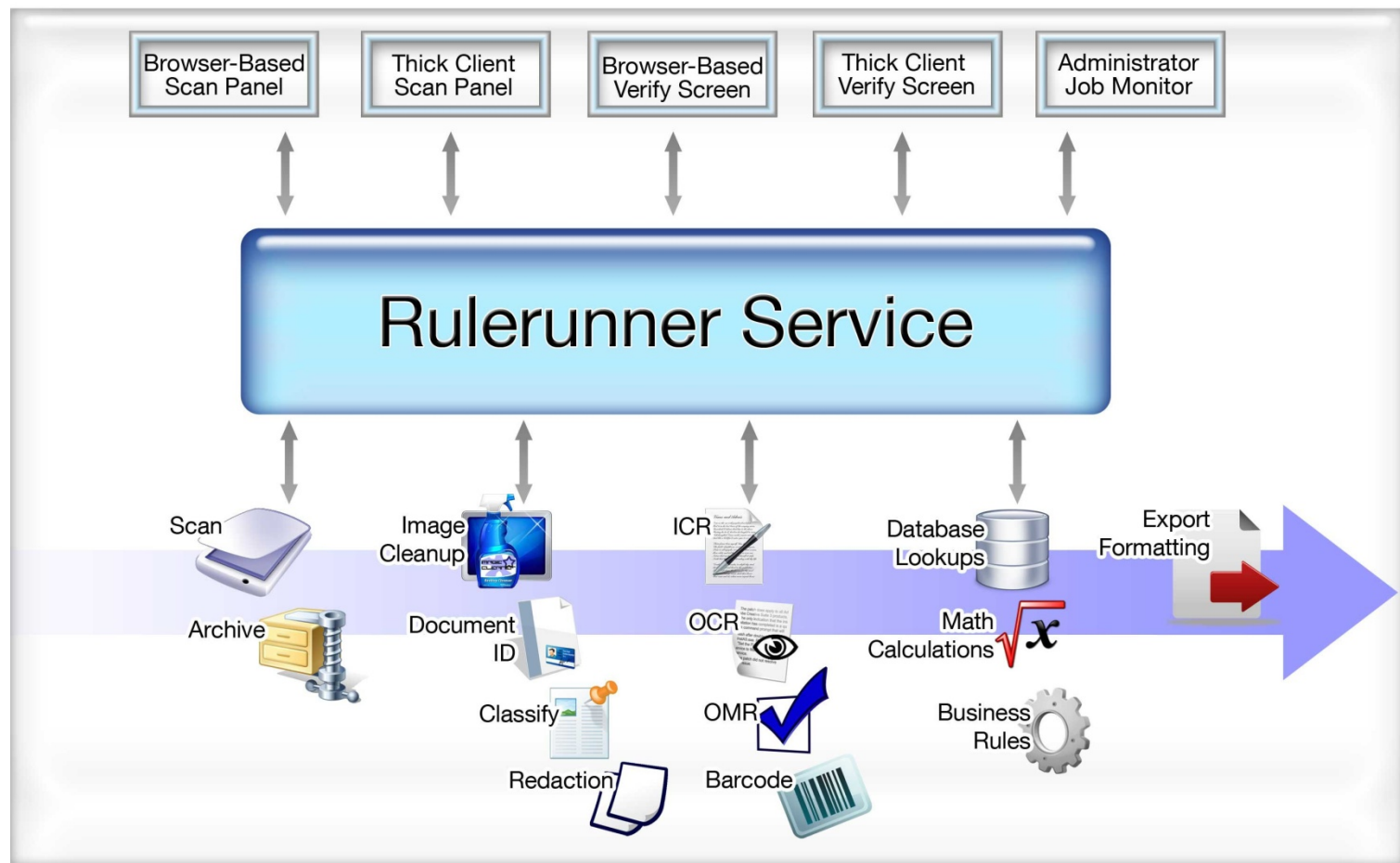## *The Enterprise Capture Platform*

Problem: Traditional Capture Process is Inflexible

Taskmaster Architecture: Robust, Flexible, Scalable

Key Industries / Applications

Government
- Tax Returns
- Property Taxes
- Motor Vehicles / Public Safety

Transportation / Logistics
- Commercial Invoices
- Customs Documents
- Brokers Orders

Healthcare
- EOBs
- Medical Records / EMR / EHR
- Healthcare Claims

Corporate AP (Invoices)
- Header Level Recognition
- Line Item Detail Extraction
- ECM / ERP Integration

Distributed Scanning
- Large # of satellite office
- Remote Scan, Process Centrally
- Improved Provisioning

Financial Services & Insurance
- Loan Documents
- Account Service Requests
- Applications & Enrollment

IBM Datacap Taskmaster Capture

- Production Document Capture
  - Central (corporate or mailroom-type) high volume scanning and indexing
  - Departmental Applications with key data extraction
  - Branch (full-function, web-based distributed deployments)

- Procedural Rules deliver the flexibility required by Enterprise Capture. Use rules to govern every step in the capture process, including:
  - Input images from multiple sources including scanners, MFDs, folders, Fax, Email
  - Process images
    - Image enhancement – deskew, remove lines, noise, rotate, etc.
    - Document classification (including Fingerprints to identify), page separation
    - Extracts data using OCR, ICR, OMR, barcode 1D and 2D technologies
    - Validates data including lookups (and retrievals)
  - Intuitive User Interface for data entry, edit and verification
    - Learns from human operator handling of exceptions
    - Thin and thick clients have same functionality
  - Export to select back-end ECM repositories and ERP/databases

- Administration
  - Web-based monitoring and administration
  - Extensive Reporting

Datacap Taskmaster Delivers a Rapid ROI

- Reduce cost of transporting paper to a central location
  - Scan documents in remote locations – branches, stores, offices, etc.
  - Savings can be more than $1M annually
  - Key capability - Distributed Capture

- Reduce data entry labor costs
  - Extract data from documents without manual keying
  - Potential to reduce data entry staff up to 90%
  - Large organizations can have hundreds of employees performing data entry
  - Key capabilities – Rules, Advanced Data Extraction

- Reduce cost of document capture
  - Reduce paper sorting and document preparation
  - Potential to reduce capture staff up to 50%
  - Key capabilities – Rules, Advanced Data Extraction

- Standardize
  - Single vendor ECM solution
  - Replace obsolete or costly legacy capture systems
  - Reduce license fees, support and maintenance costs
  - Eliminate volume-based pricing
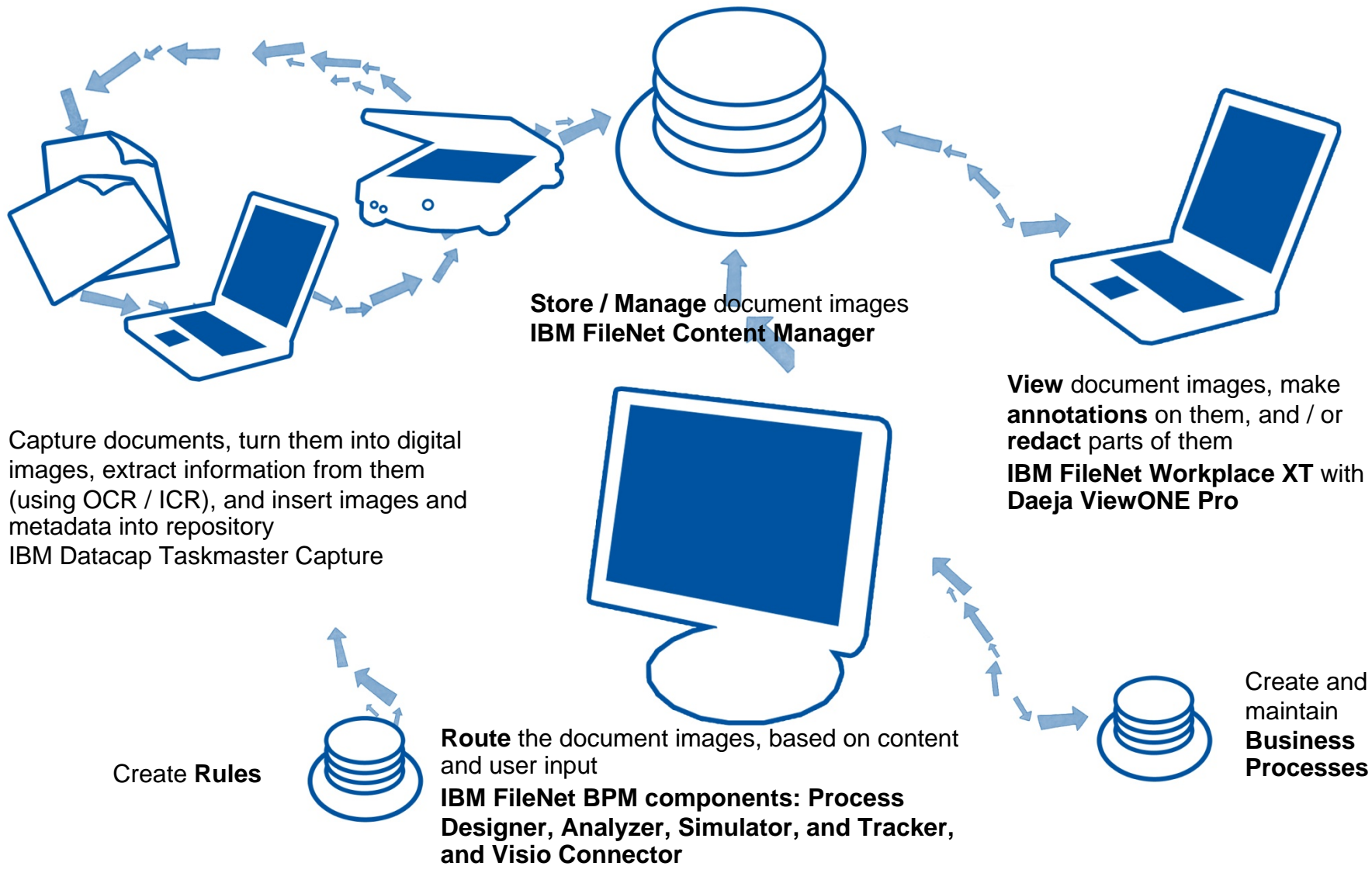
What Sets IBM Apart?

- Rulerunner Service is IBM Datacap's Rules Execution Engine - none of our competitors offer this capability
    - Implements in weeks not months
    - Quickly adapts to change
    - Call Rulerunner Service via SOA service from applications for in-process capture

- Attractive, User-based Pricing
    - Competitors charge per page which is excessively costly, inflexible and unpopular

- Single product for both basic and advanced capture
    - Scalable from a single client to thousands
    - Includes advanced data extraction and many capabilities that are expensive add-on modules in our competitor's products
    - Local and distributed
    - Thick and thin clients on a single platform

Benefits of IBM's Single Vendor Capture and ECM Portfolio

- Lower Total Cost of Ownership with consistent licensing and maintenance
  - Capture typically less than 1:1 (services:software)
  - Fewer vendor contracts to administer
  - Reduced training and administration

- Document Capture is the "onramp" to strategic Enterprise Content Management solutions
  - Production Imaging
  - Advanced Case Management
  - Information Lifecycle Governance
  - In process capture – call capture as service from any point in ECM process

- Organizations with large quantities of document-based transactions can use capture to streamline such applications as: Accounts Payable Invoices, Loan Origination and Servicing, Account Opening, Insurance Claims, Government Tax, Social Benefits, & Licenses built on IBM ECM platforms

Single Vendor = $$$ Savings

IBM Production Imaging Edition

Store / Manage document images
IBM FileNet Content Manager

Capture documents, turn them into digital images, extract information from them (using OCR / ICR), and insert images and metadata into repository
IBM Datacap Taskmaster Capture

View document images, make **annotations** on them, and / or **redact** parts of them
IBM FileNet Workplace XT with **Daeja ViewONE Pro**

Create **Rules**

Route the document images, based on content and user input
IBM FileNet BPM components: Process Designer, Analyzer, Simulator, and Tracker, and Visio Connector

Create and maintain **Business Processes**

Developing the ROI: What is document input costing you today?

- Paper based: No scanning
  - Forms arrive as paper
  - Forms are processed as paper
  - Forms are saved as paper
  - **Expensive personnel costs, filing retrieval, storage**
  - **Hi potential for lost or misfiled documents**
  - **Customer service suffers**

- Scanning for archival purposes only
  - Scanning paper forms
  - Images saved in document management system
  - **Less expensive than paper-based**
  - **Potential for data entry errors**
  - **Customer service improves**

Capture, ECM and Optimized Business Processes

- Automated Capture and Business Processes
    - Documents are scanned
    - Data is captured
    - Images & data routed for processing using BPM
    - Images saved in an ECM repository

- Much less expensive than paper based over time
    - Reduced personnel cost
    - Less Filing/Retrieval management
    - Real estate/Long term storage
    - AP Capture helps enable discounts

- Low potential for data entry errors

- Multi user system

- Customer service really improves!

… and you can dispose of the paper!

Demonstration Taskmaster Distributed Capture
Tom Simalchik
Datacap Product Marketing Manager

- Taskmaster APT for invoice capture
  - Distributed scanning
  - Centralized document processing
  - Distributed and centralized document verification
  - Distributed and centralized administration
  - Extensive data validations, database lookups and retrievals

Q & A